User Manual

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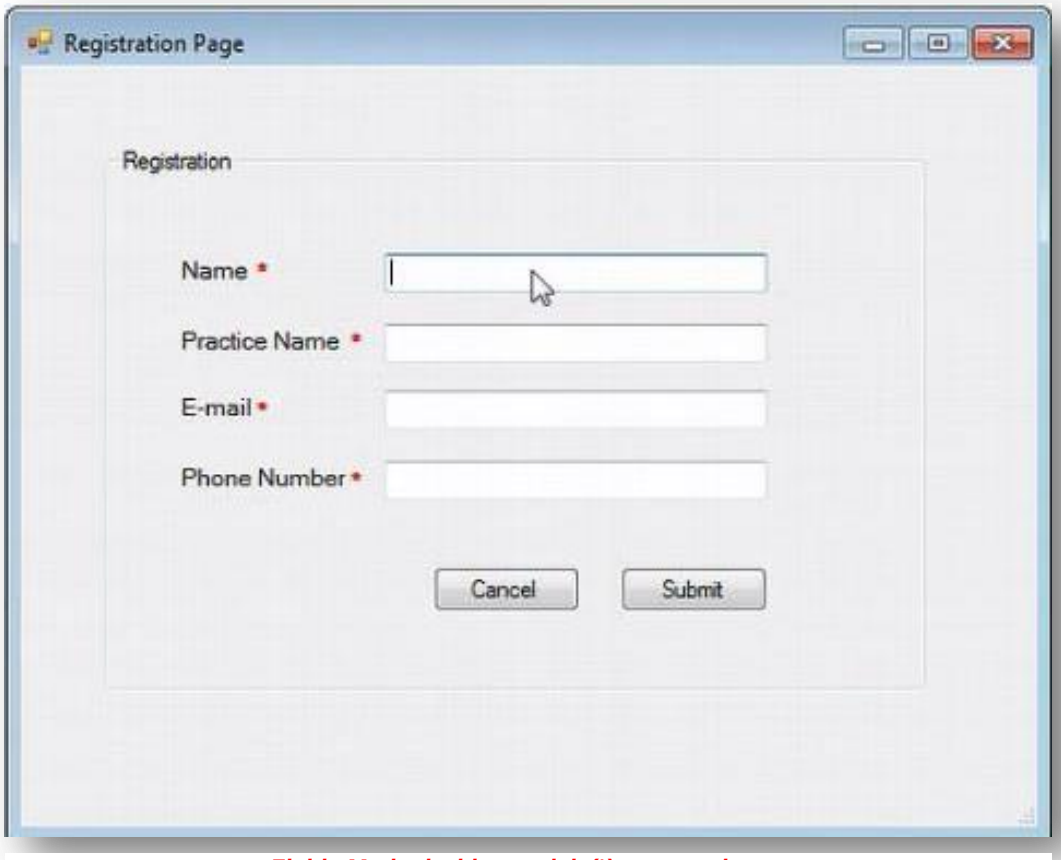
1. User Registration

- Once C**onvergedComm (CC)** is installed, user will be asked to register over the network.
- The First Run of ConvergedComm provides a registration form which carries the fields: Name, email, Practice Name and Phone Number (auto detect from the Practice Management Software installed on the machine). User has to register in order to use.



Fields Marked with asterisk (*) are mandatory

- These details will be used to access the CC account, such as user's name, phone number, and practice name.

1. Upon completion, click **Submit**. (*If you do not fill the field marked with an (*), you will receive an error after this step).*

<Screenshot>

2. Now, the request will be sent to ConvergedComm (CC) administrator for approval.
3. Once the CC administrator approves the registration, user will receive an email confirming the approval request.

Note: Until and unless registration is approved, user cannot use ConvergedComm.

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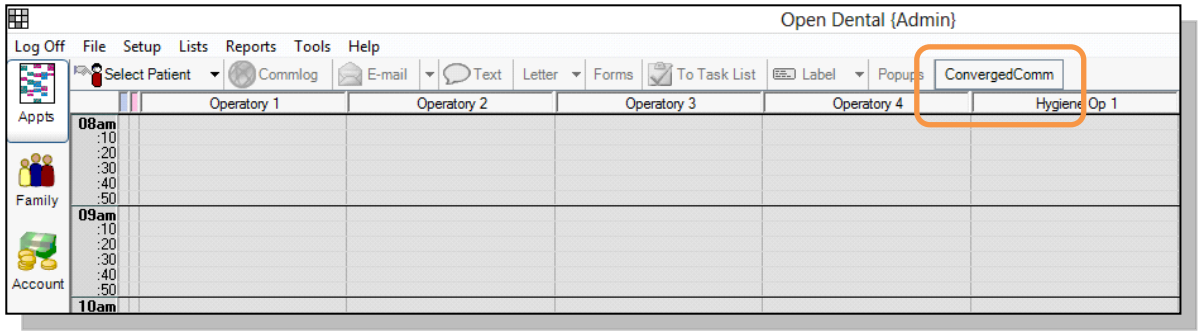
2. ConvergedComm Layout

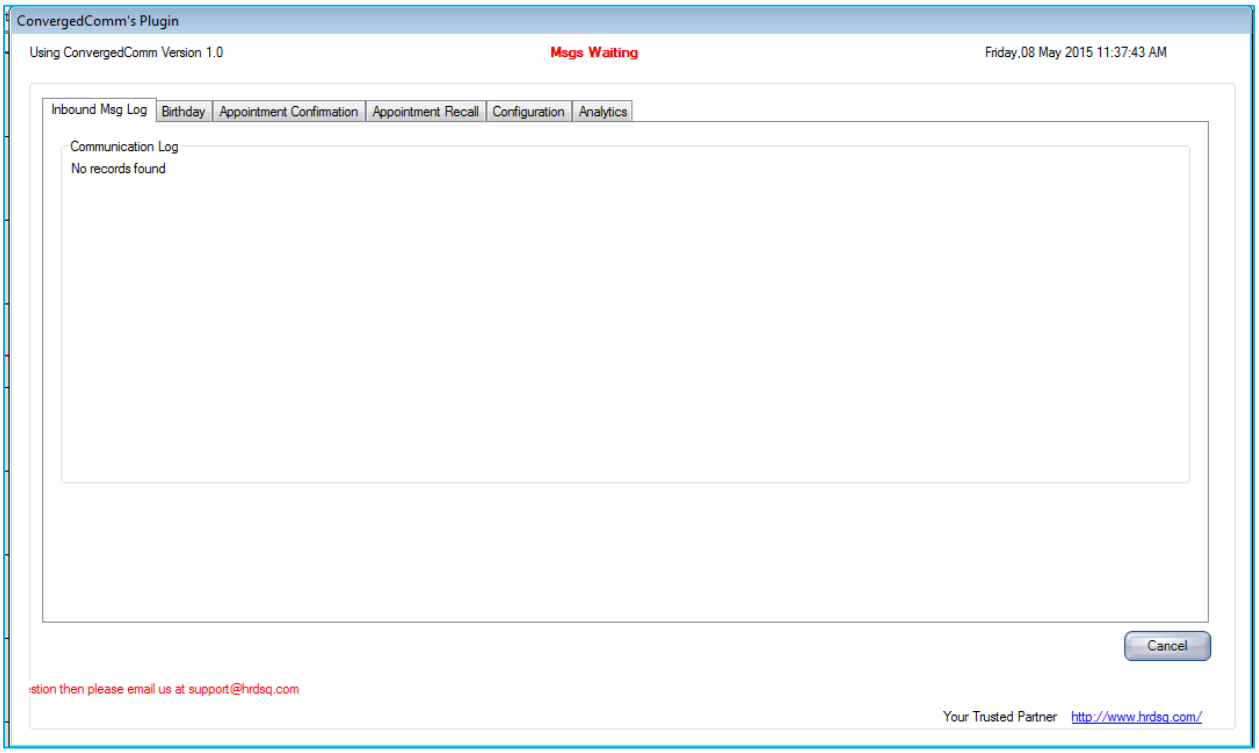
After the successful installation of the ConvergedComm on the system, the ConvergedComm (CC) will appear within the Open Dental, as shown below:



ConvergedComm

The ConvergedComm layout comprises six main areas (tabs):

2.1 Inbound Msg Log
2.2 Birthday
2.3 Appointment Confirmation
2.4 Appointment Recall
2.5 Configuration
2.6 Analytics.



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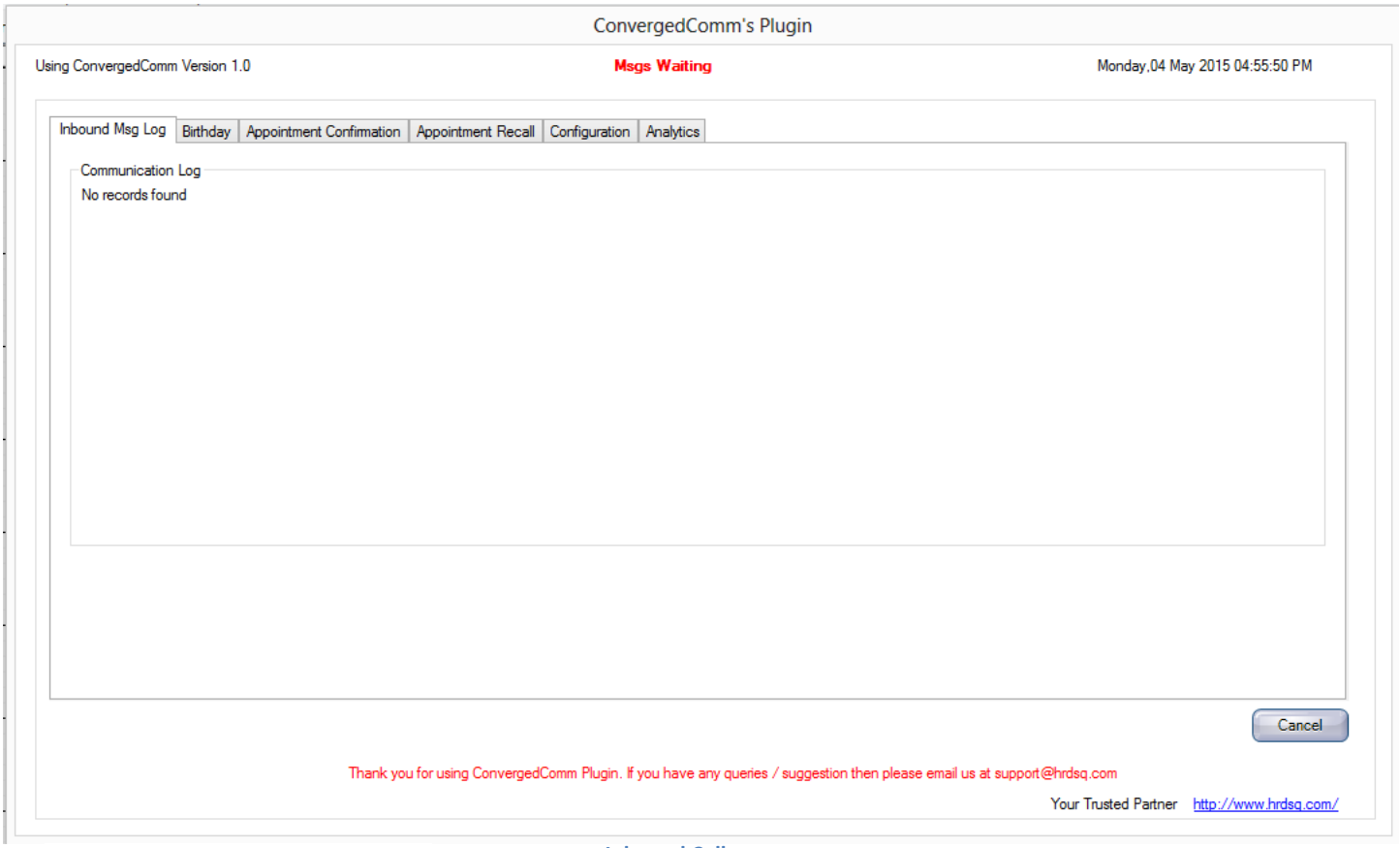
ConvergedComm

2.1 Inbound and Outbound Communication log

In any practice, one of the keys to success is organizing and maintaining communication. ConvergedComm lets our customers organize all the communication (both inbound and outbound), in one place and chronological order. This greatly reduces staff effort, freeing up time on managing customer relationship!



Inbound Calls

2.2 Birthday Wishes to Patients

Wishing a patient on important occasions shows that you care and is a great tool to earn customer loyalty. As is the case with others, this fully automated feature can send customized messages via multiple channels.

This tab is being used to send the Birthday Greeting using SMS, Email, and IVR facility being provided.

2.2.1 How to send Birthday wishes to patients-

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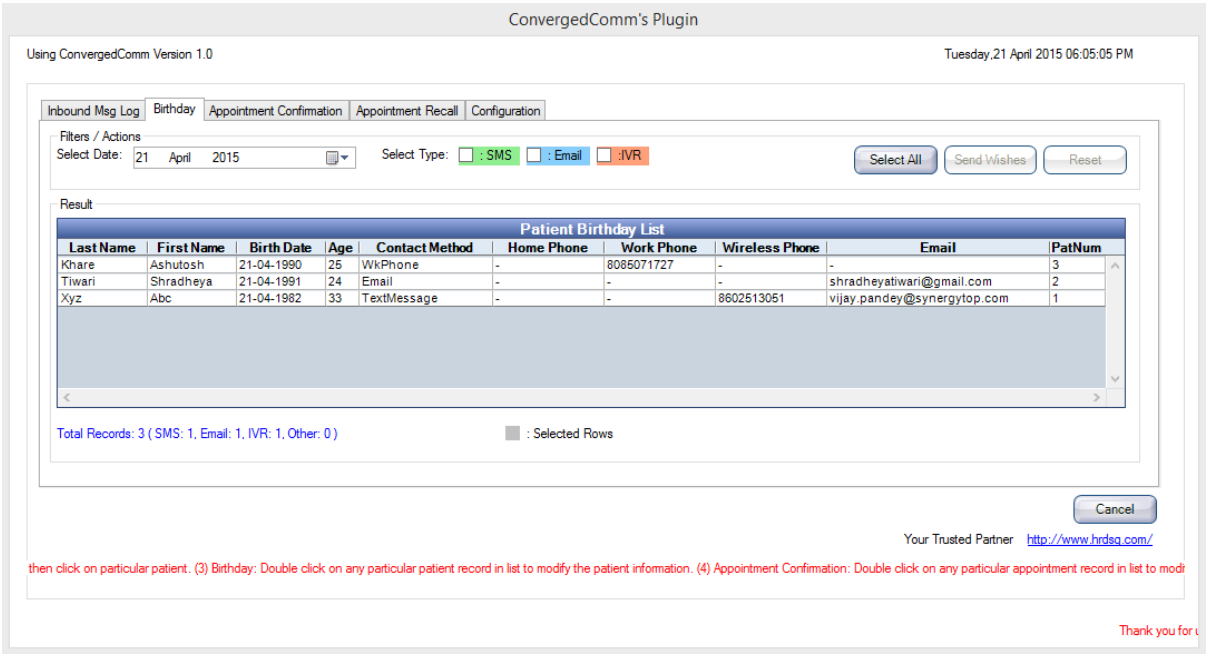
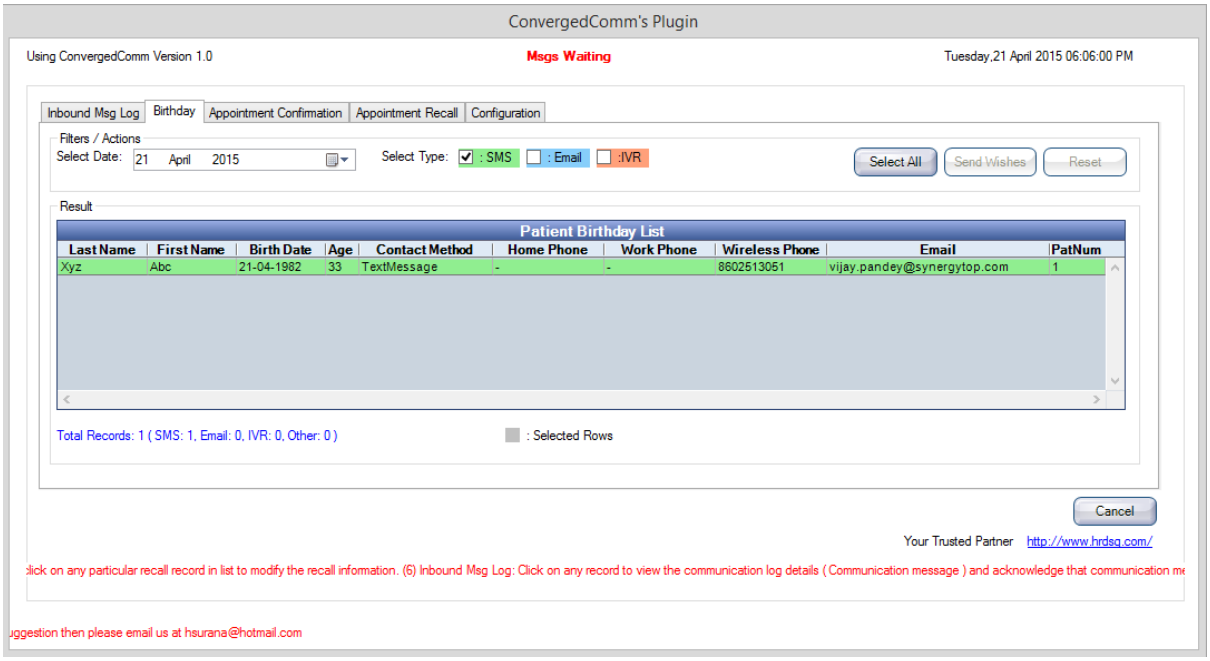
- Click on **ConvergedComm** button.


ConvergedComm's Plugin
Using ConvergedComm Version 1.0
Tuesday,21 April 2015 06:05:05 PM
Inbound Msg Log
Birthday
Appointment Confirmation
Appointment Recall
Configuration
Filters / Actions
Select Date: 21 April 2015
Select Type: : SMS : Email :IVR
Select All
Send Wishes
Reset
Result
Patient Birthday List
Last Name | First Name | Birth Date | Age | Contact Method | Home Phone | Work Phone | Wireless Phone | Email | PatNum
Khare | Ashutosh | 21-04-1990 | 25 | WkPhone | - | 8085071727 | - | - | 3
Tiwari | Shradheya | 21-04-1991 | 24 | Email | - | - | - | shradheyatiwari@gmail.com | 2
Xyz | Abc | 21-04-1982 | 33 | TextMessage | - | - | 8602513051 | vijay.pandey@synergytop.com | 1
Total Records: 3 (SMS: 1, Email: 1, IVR: 1, Other: 0)
: Selected Rows
Cancel
Your Trusted Partner http://www.hrdsq.com/
then click on particular patient. (3) Birthday: Double click on any particular patient record in list to modify the patient information. (4) Appointment Confirmation: Double click on any particular appointment record in list to modi
Thank you for

1: Birthday

- You can filter the patient by clicking on checkbox-(SMS)


ConvergedComm's Plugin
Using ConvergedComm Version 1.0
Msgs Waiting
Tuesday,21 April 2015 06:06:00 PM
Inbound Msg Log
Birthday
Appointment Confirmation
Appointment Recall
Configuration
Filters / Actions
Select Date: 21 April 2015
Select Type: : SMS : Email :IVR
Select All
Send Wishes
Reset
Result
Patient Birthday List
Last Name | First Name | Birth Date | Age | Contact Method | Home Phone | Work Phone | Wireless Phone | Email | PatNum
Xyz | Abc | 21-04-1982 | 33 | TextMessage | - | - | 8602513051 | vijay.pandey@synergytop.com | 1
Total Records: 1 (SMS: 1, Email: 0, IVR: 0, Other: 0)
: Selected Rows
Cancel
Your Trusted Partner http://www.hrdsq.com/
click on any particular recall record in list to modify the recall information. (6) Inbound Msg Log: Click on any record to view the communication log details (Communication message) and acknowledge that communication m
uggestion then please email us at hsurana@hotmail.com

2: Birthday

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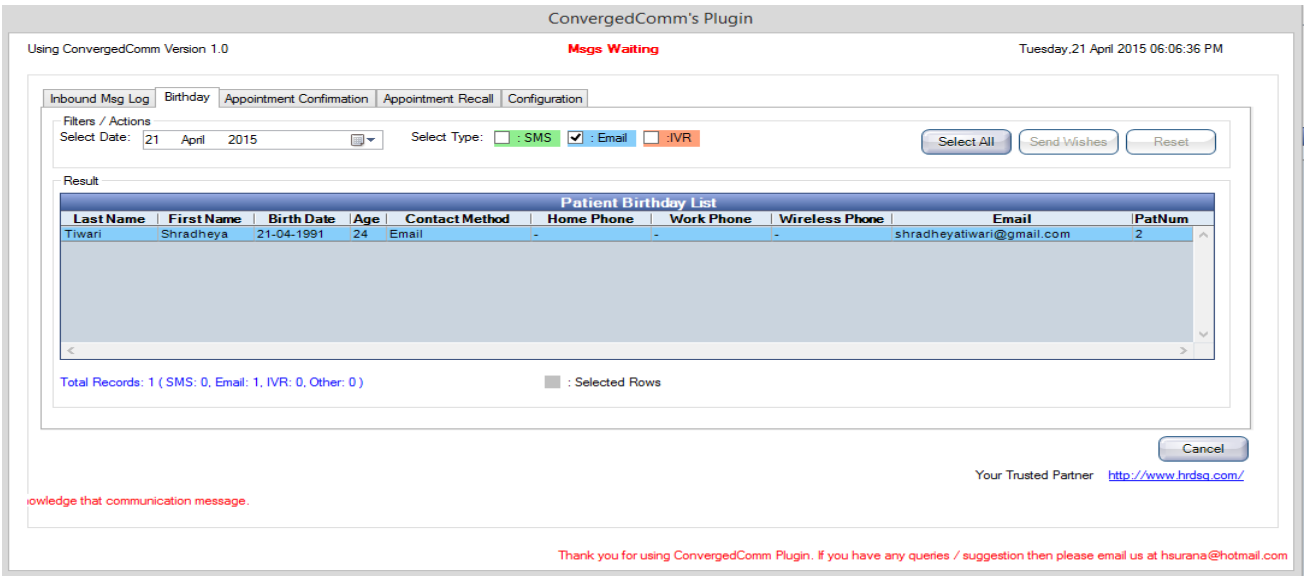
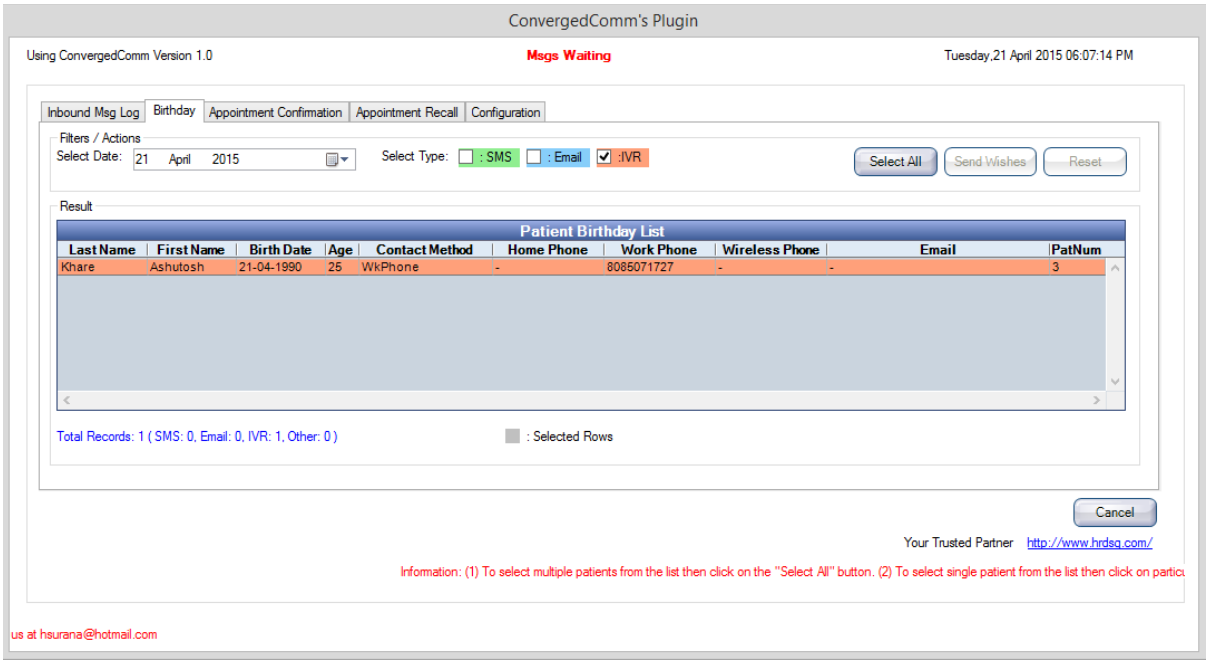
- You can filter the patient by clicking on checkbox-(Email)


ConvergedComm's Plugin
Using ConvergedComm Version 1.0
Msgs Waiting
Tuesday,21 April 2015 06:06:36 PM
Inbound Msg Log
Birthday
Appointment Confirmation
Appointment Recall
Configuration
Filters / Actions
Select Date: 21 April 2015
Select Type: : SMS : Email :IVR
Select All
Send Wishes
Reset
Result
Patient Birthday List
Last Name | First Name | Birth Date | Age | Contact Method | Home Phone | Work Phone | Wireless Phone | Email | PatNum
Tiwari | Shradheya | 21-04-1991 | 24 | Email | - | - | - | shradheyatiwari@gmail.com | 2
Total Records: 1 (SMS: 0, Email: 1, IVR: 0, Other: 0)
: Selected Rows
Cancel
Your Trusted Partner http://www.hrdsq.com/
owledge that communication message.
Thank you for using ConvergedComm Plugin. If you have any queries / suggestion then please email us at hsurana@hotmail.com

3: Birthday

- You can filter the patient by clicking on checkbox-(IVR)


ConvergedComm's Plugin
Using ConvergedComm Version 1.0
Msgs Waiting
Tuesday,21 April 2015 06:07:14 PM
Inbound Msg Log
Birthday
Appointment Confirmation
Appointment Recall
Configuration
Filters / Actions
Select Date: 21 April 2015
Select Type: : SMS : Email :IVR
Select All
Send Wishes
Reset
Result
Patient Birthday List
Last Name | First Name | Birth Date | Age | Contact Method | Home Phone | Work Phone | Wireless Phone | Email | PatNum
Khare | Ashutosh | 21-04-1990 | 25 | WkPhone | - | 8085071727 | - | - | 3
Total Records: 1 (SMS: 0, Email: 0, IVR: 1, Other: 0)
: Selected Rows
Cancel
Your Trusted Partner http://www.hrdsq.com/
Information: (1) To select multiple patients from the list then click on the "Select All" button. (2) To select single patient from the list then click on partic
us at hsurana@hotmail.com

4: Birthday

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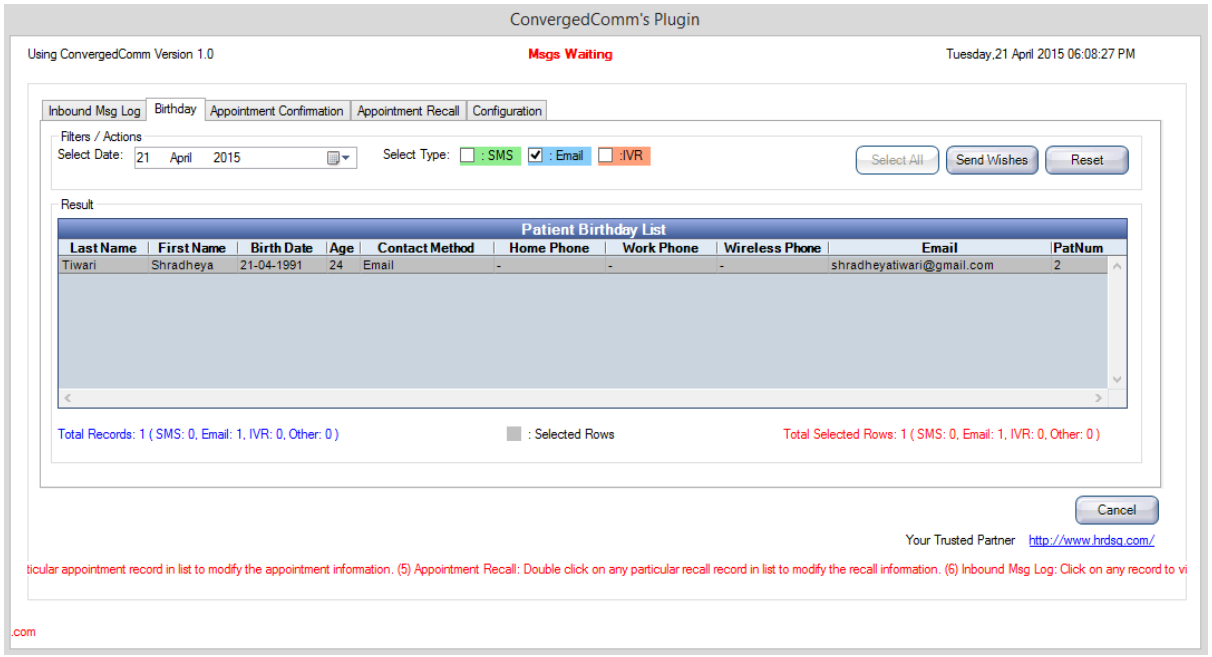
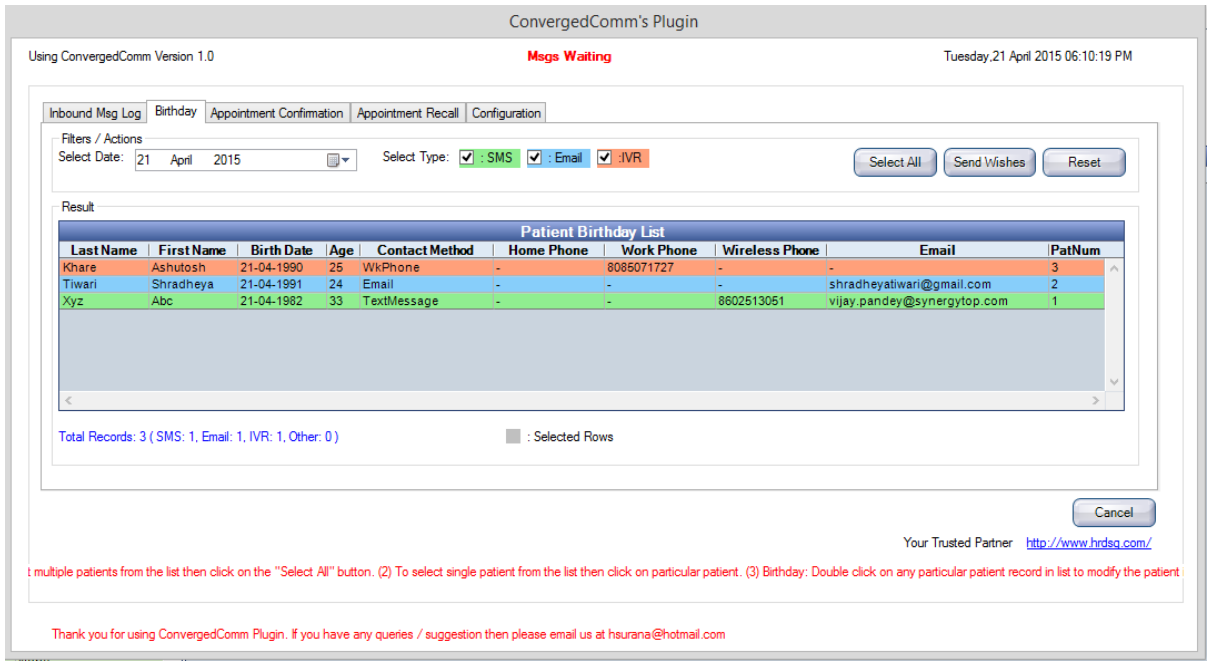
- User can also view the Total selected rows on the bottom right corner.


ConvergedComm's Plugin
Using ConvergedComm Version 1.0
Msgs Waiting
Tuesday,21 April 2015 06:08:27 PM
Inbound Msg Log
Birthday
Appointment Confirmation
Appointment Recall
Configuration
Filters / Actions
Select Date: 21 April 2015
Select Type: : SMS : Email :IVR
Select All
Send Wishes
Reset
Result
Patient Birthday List
Last Name | First Name | Birth Date | Age | Contact Method | Home Phone | Work Phone | Wireless Phone | Email | PatNum
Tiwari | Shradheya | 21-04-1991 | 24 | Email | - | - | - | shradheyatiwari@gmail.com | 2
Total Records: 1 (SMS: 0, Email: 1, IVR: 0, Other: 0)
: Selected Rows
Total Selected Rows: 1 (SMS: 0, Email: 1, IVR: 0, Other: 0)
Cancel
Your Trusted Partner http://www.hrdsq.com/

5: Birthday

- User can also view all the entries by checking all checkboxes.


ConvergedComm's Plugin
Using ConvergedComm Version 1.0
Msgs Waiting
Tuesday,21 April 2015 06:10:19 PM
Inbound Msg Log
Birthday
Appointment Confirmation
Appointment Recall
Configuration
Filters / Actions
Select Date: 21 April 2015
Select Type: : SMS : Email :IVR
Select All
Send Wishes
Reset
Result
Patient Birthday List
Last Name | First Name | Birth Date | Age | Contact Method | Home Phone | Work Phone | Wireless Phone | Email | PatNum
Khare | Ashutosh | 21-04-1990 | 25 | WkPhone | - | 8085071727 | - | - | 3
Tiwari | Shradheya | 21-04-1991 | 24 | Email | - | - | - | shradheyatiwari@gmail.com | 2
Xyz | Abc | 21-04-1982 | 33 | TextMessage | - | - | 8602513051 | vijay.pandey@synergytop.com | 1
Total Records: 3 (SMS: 1, Email: 1, IVR: 1, Other: 0)
: Selected Rows
Cancel
Your Trusted Partner http://www.hrdsq.com/
Thank you for using ConvergedComm Plugin. If you have any queries / suggestion then please email us at hsurana@hotmail.com

6: Birthday

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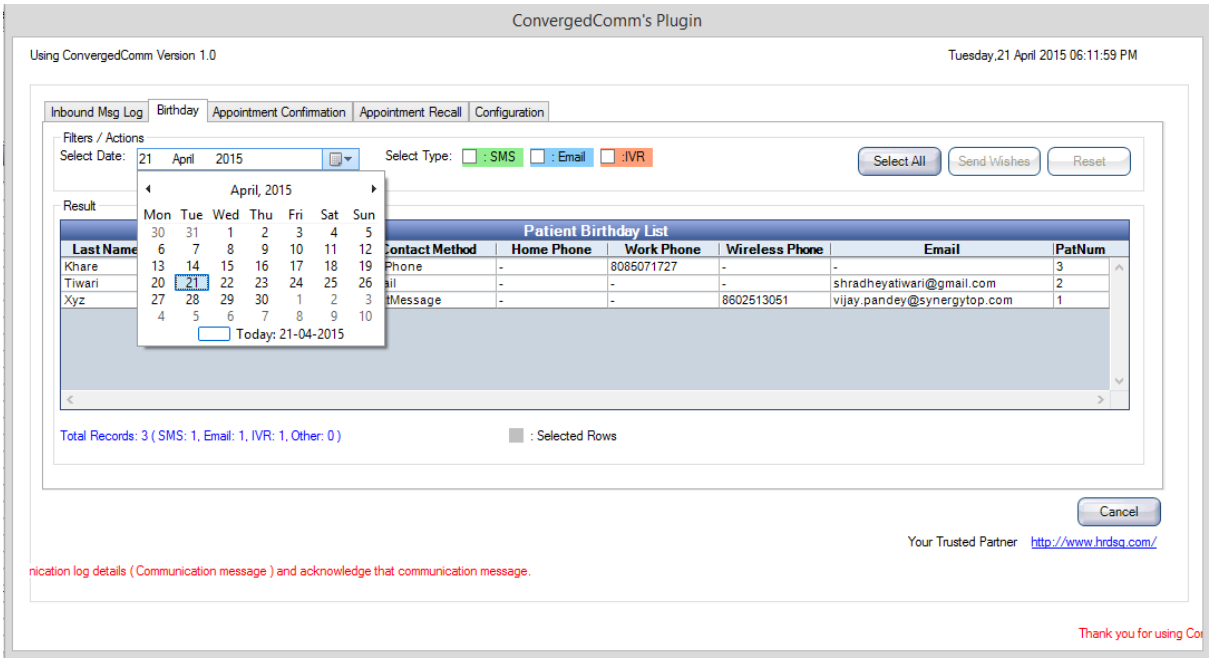
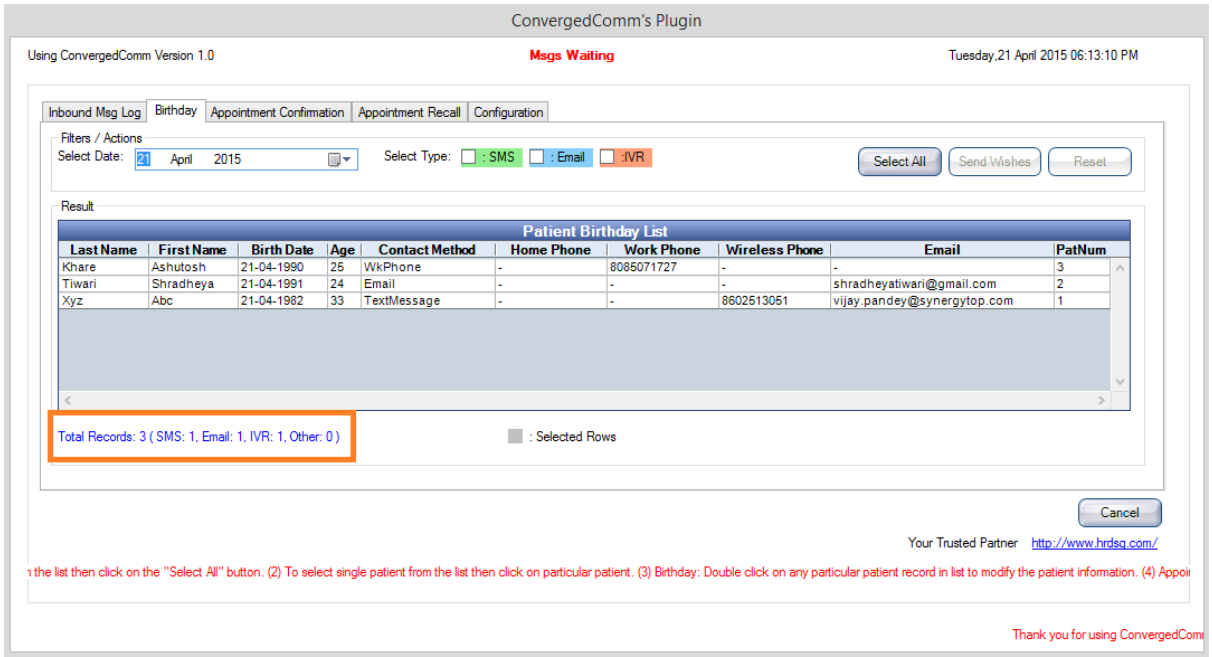
- User can also see the patient list on the basis of date.



7: Birthday

- User can also view the number of entries in each category on the bottom left corner.


ConvergedComm's Plugin
Using ConvergedComm Version 1.0
Msgs Waiting
Tuesday,21 April 2015 06:13:10 PM
Inbound Msg Log
Birthday
Appointment Confirmation
Appointment Recall
Configuration
Filters / Actions
Select Date: 21 April 2015
Select Type: : SMS : Email :IVR
Select All
Send Wishes
Reset
Result
Patient Birthday List
Last Name First Name Birth Date Age Contact Method Home Phone Work Phone Wireless Phone Email PatNum
Khare Ashutosh 21-04-1990 25 WkPhone - 8085071727 - - 3
Tiwari Shradheya 21-04-1991 24 Email - - - shradheyatiwari@gmail.com 2
Xyz Abc 21-04-1982 33 TextMessage - - 8602513051 vijay.pandey@synergytop.com 1
Total Records: 3 (SMS: 1, Email: 1, IVR: 1, Other: 0)
: Selected Rows
Cancel
Your Trusted Partner http://www.hrdsq.com/
the list then click on the "Select All" button. (2) To select single patient from the list then click on particular patient. (3) Birthday: Double click on any particular patient record in list to modify the patient information. (4) Appoi
Thank you for using ConvergedCom

8: Birthday

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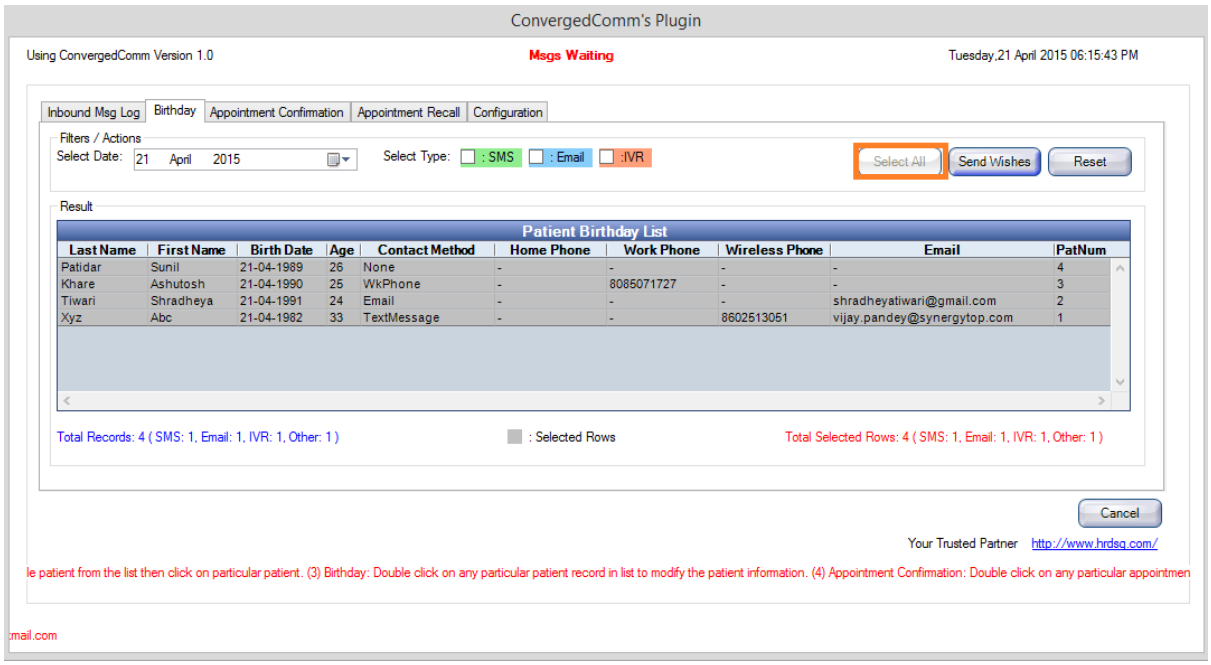
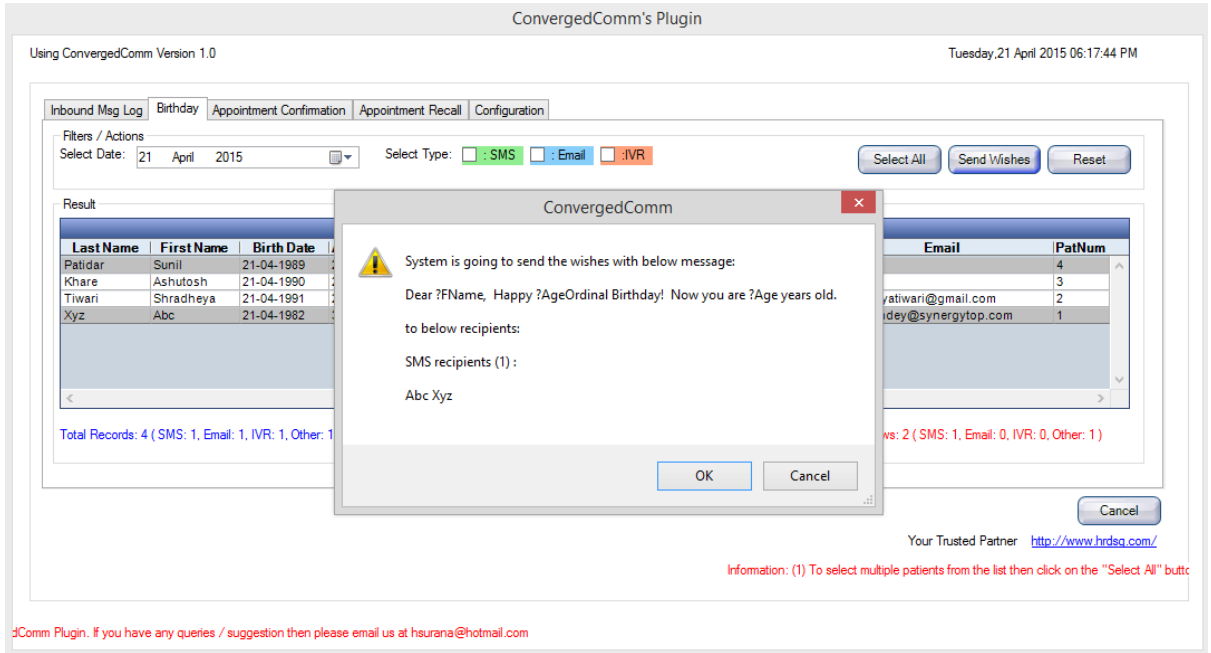
- User can also select all the patients by clicking on **Select All** button.


ConvergedComm's Plugin
Using ConvergedComm Version 1.0
Msgs Waiting
Tuesday,21 April 2015 06:15:43 PM
Inbound Msg Log
Birthday
Appointment Confirmation
Appointment Recall
Configuration
Filters / Actions
Select Date: 21 April 2015
Select Type: : SMS : Email :IVR
Select All
Send Wishes
Reset
Result
Patient Birthday List
Last Name | First Name | Birth Date | Age | Contact Method | Home Phone | Work Phone | Wireless Phone | Email | PatNum
Patidar | Sunil | 21-04-1989 | 26 | None | - | - | - | - | 4
Khare | Ashutosh | 21-04-1990 | 25 | WkPhone | - | 8085071727 | - | - | 3
Tiwari | Shradheya | 21-04-1991 | 24 | Email | - | - | - | shradheyatiwari@gmail.com | 2
Xyz | Abc | 21-04-1982 | 33 | TextMessage | - | - | 8602513051 | vijay.pandey@synergytop.com | 1
Total Records: 4 (SMS: 1, Email: 1, IVR: 1, Other: 1)
: Selected Rows
Total Selected Rows: 4 (SMS: 1, Email: 1, IVR: 1, Other: 1)
Cancel
Your Trusted Partner http://www.hrdsq.com/

9: Birthday

- Select patients and click on Send Wishes, the Pop-up will come along with message to be sent.



10: Birthday

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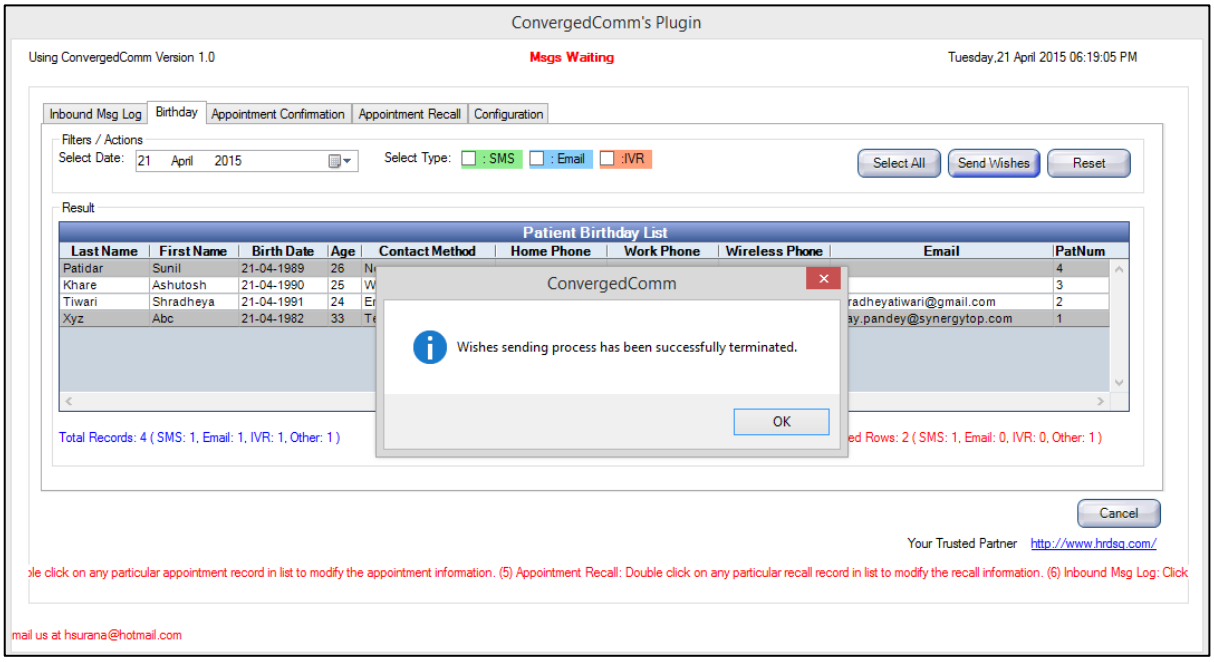
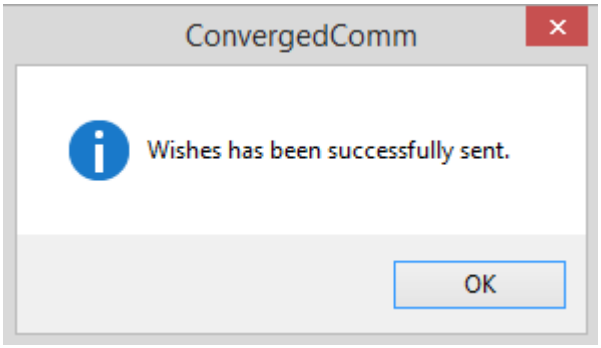
- If user clicks on cancel then message will be send.



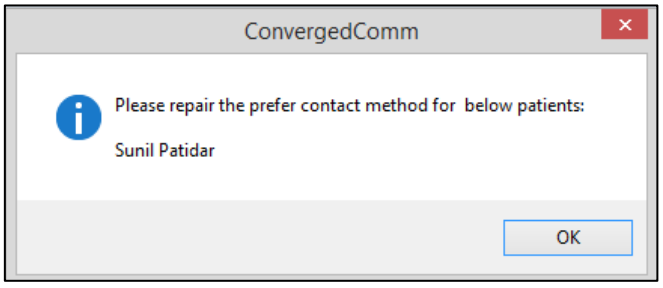
11: Birthday

- If user clicks on Ok to send wishes then message will be sent.



12: Birthday

- If we have made a patient and not selected any **Preferred Contact Method**, and trying to send wishes to that patient then this message will appear.



13: Birthday

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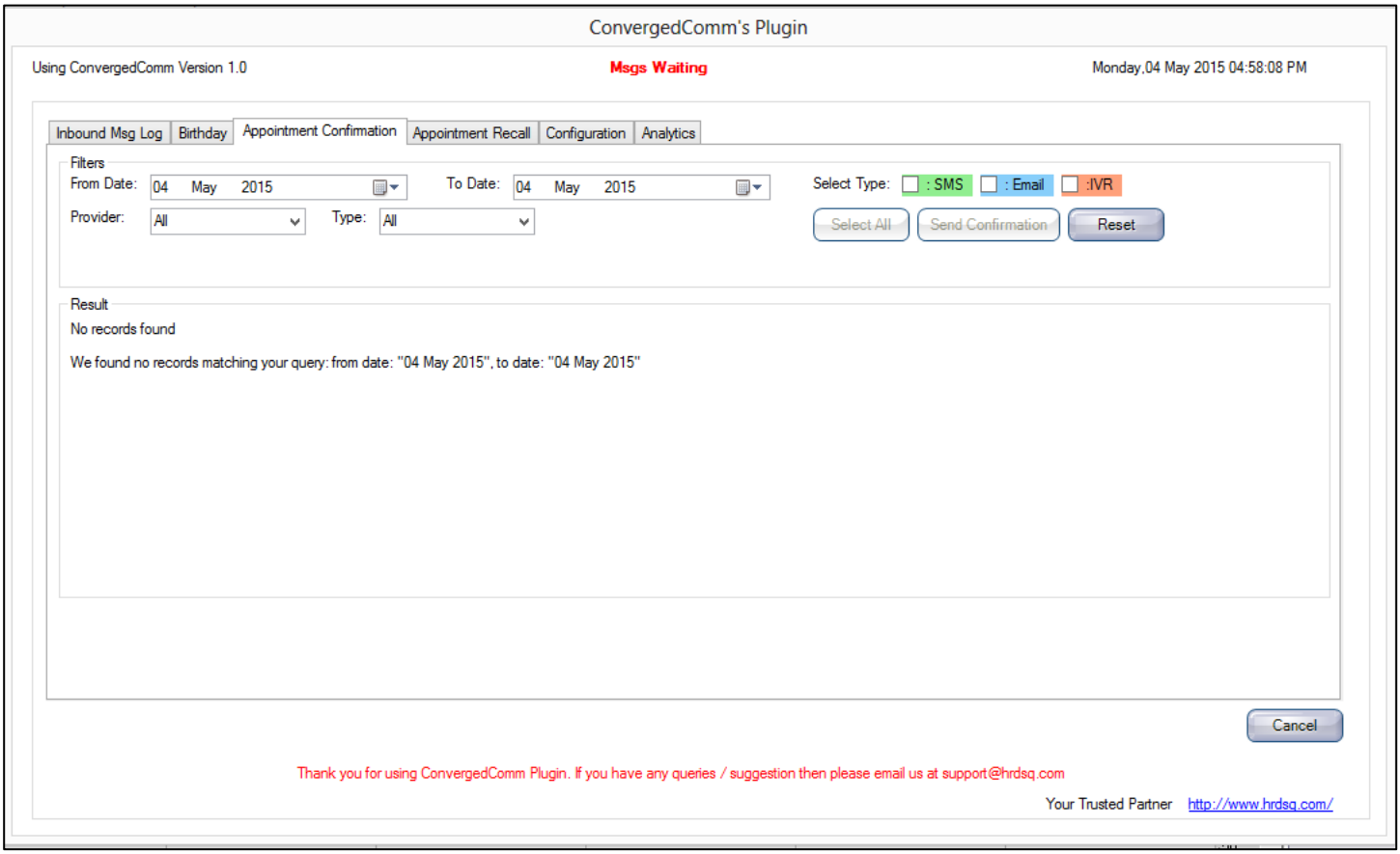
Note: Email SMTP needs to be configured in the OD, prior to sending email.

Email Message text is not appropriate.

2.3 Automatic Appointment Confirmation

Truly automatic appointment confirmations via SMS/Email/IVR depending on patient's preference, no manual intervention required!



Appointment Confirmation

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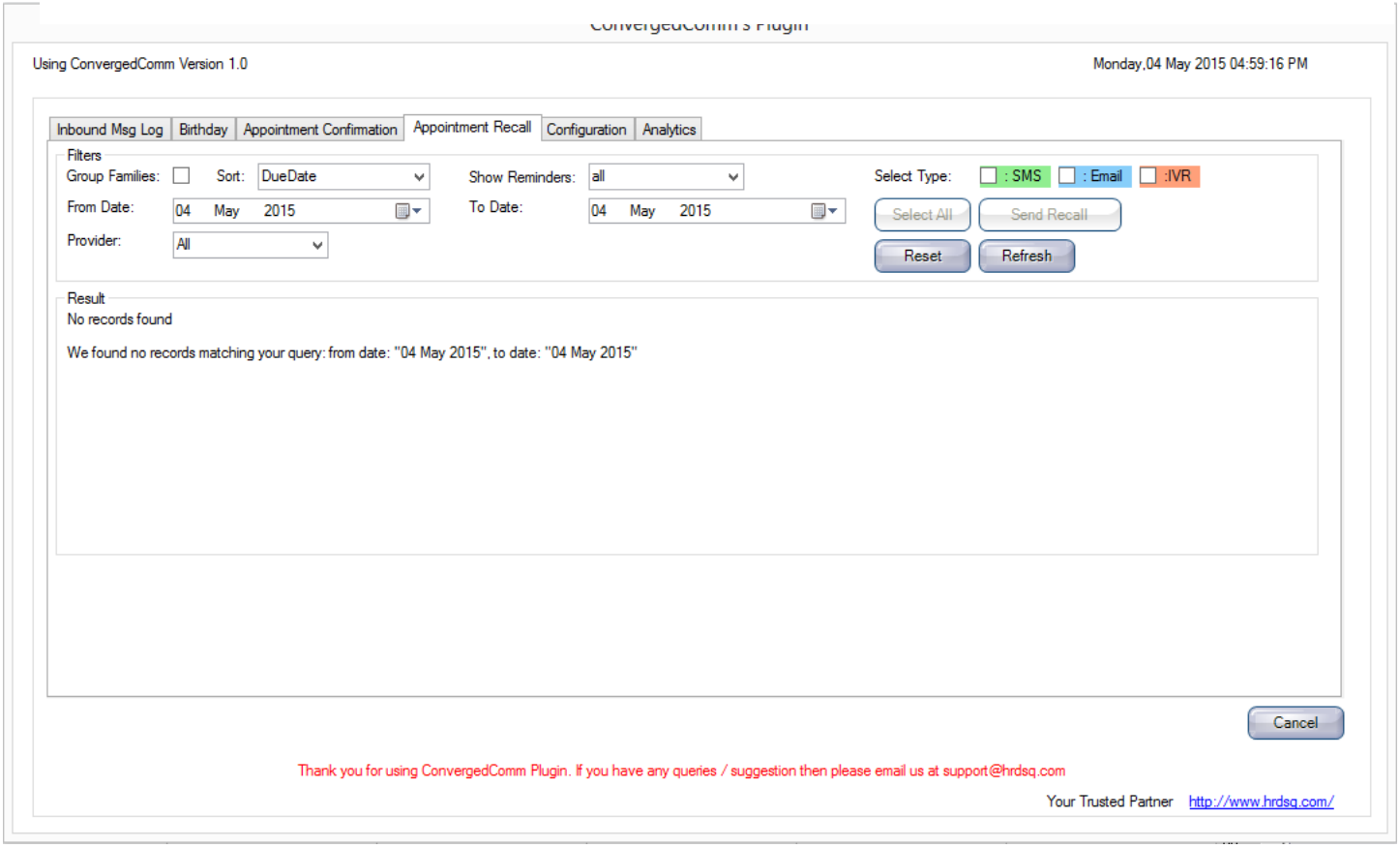
2.4 Appointment Recall

Recall is a system for contacting patients who are past due for a visit and don't have one scheduled yet. ConvergedComm's recall system, like other features, is completely automated. Setups once and never worry about it. It does its work in the background but the results would be very obvious to you.



Appointment Recall

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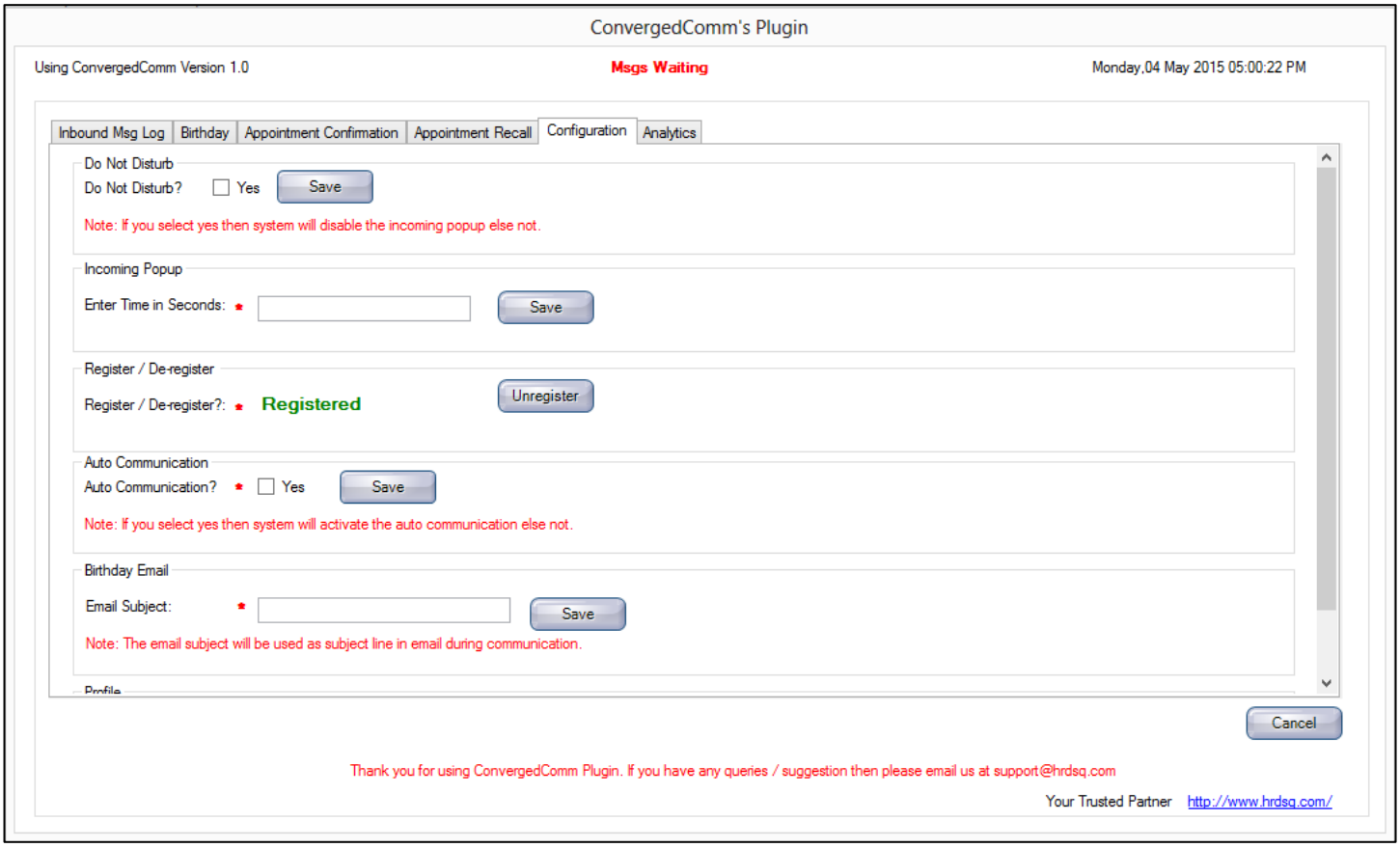
2.5 Configuration

Do Not Disturb: This functionality when checked and saved, does not allows the incoming call POP UP.

Incoming POPUP Timing: We can specify the time in Seconds, for which the Incoming Popup would remain active when no activity is being performed on it.

Register: Register and Un-register facility allows the number to be registered or un-registered on the server. It is a toggle button, if the user desire to un-register, the number gets un-registered from the SIP server and POP UP stops appearing.

Auto Communication : When checked , sends greetings automatically on the first launch of the application.



Configuration

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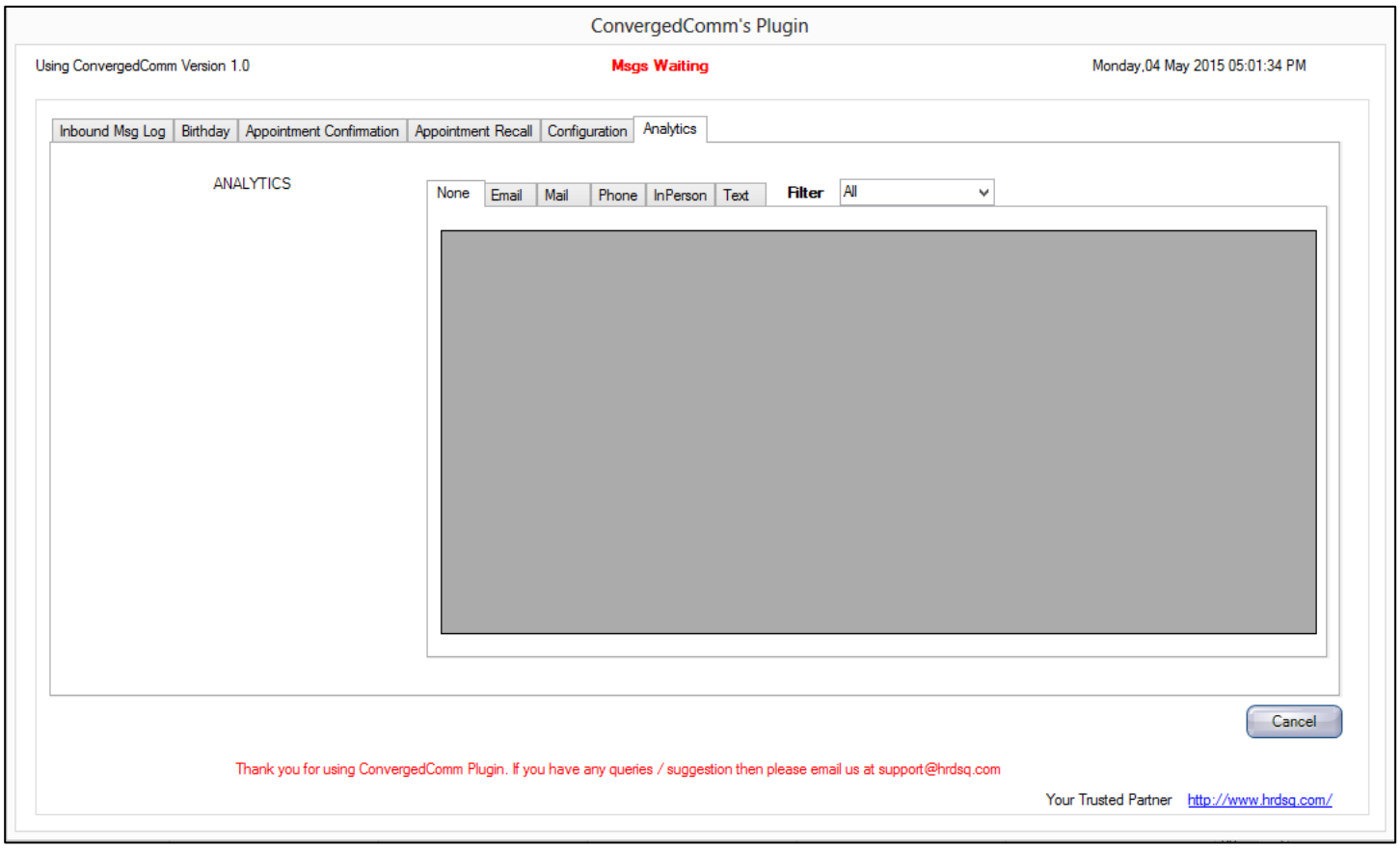
2.6 Analytics

This tab currently shows graphical representation and details of the OUTBOUND Communication from OD and ConvergedComm Plugin. User can use Filter to filter on records. All data entered in the OUTBOUND ConvergedComm Log of OD and automatic entry is done of IVR, SMS and email being sent using the Birthday Tab, is being shown here.



Analytics

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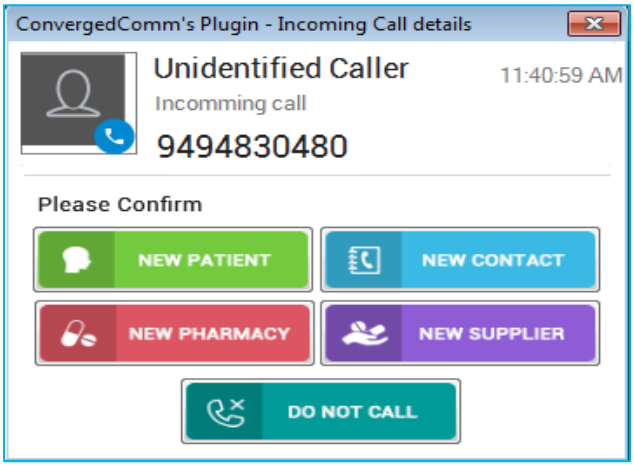
3. Unidentified Call (popup) Layout

This pop-up lets the user (dentist or any other registered user) know if any new Patient, Supplier, Pharmacy or any new contact is calling. It will display the phone number of the caller. At the topmost right corner of the pop-up window, it will display the picture (if available) of the caller. This pop-up can be moved to any location on the desktop.

This Unidentified Call (popup) layout comprises of five main areas (tabs):

2.3 New Patient
2.4 New Contact
2.5 New Pharmacy
2.6 New Supplier
2.7 Do Not Call

The layout will look like below:



Incoming Call Pop-up

This will benefit the dentists to put the details of the unknown caller, right at the time of ongoing call.

3.1 New Patient

A new patient will be any recipient of the dental services, any person in need of treatment by the dentist.

To add a new patient:

- Click on **New Patient** (Green Colored tab).
- Fill out the necessary and mandatory details.
- Click **Add Pt.**

The layout will look like below:

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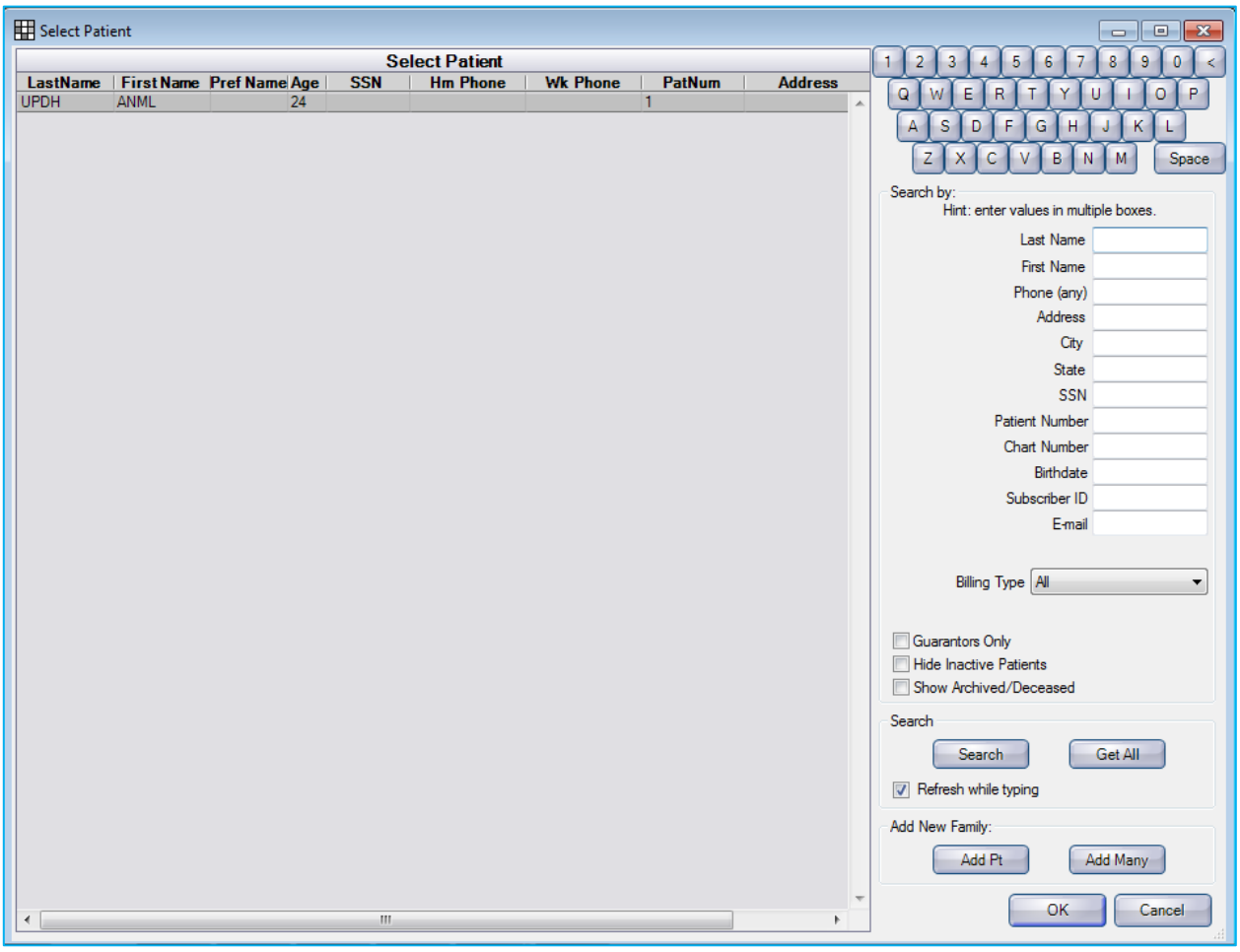

Select or Add Patient

This feature will reduce the time taken after the call to add any information for the new patient. Even the details of the patient can be updated after the call.

3.2 New Contact

The patient calls from a number which is not stored in the contact list. This will be added to the contact list by the user, so that, next time whenever that patient/any other person calls in, the pop-up will not show “Unidentified Caller”.

This feature helps in putting the contacts while the ongoing call. This will be a phonebook for the dentist. This will help avoiding undefined calls for the next time.

To add a new pharmacy:

- Click on **New Pharmacy** (Red Colored tab).
- Fill out the necessary and mandatory details.
- Click **OK.**

The layout will look like below:

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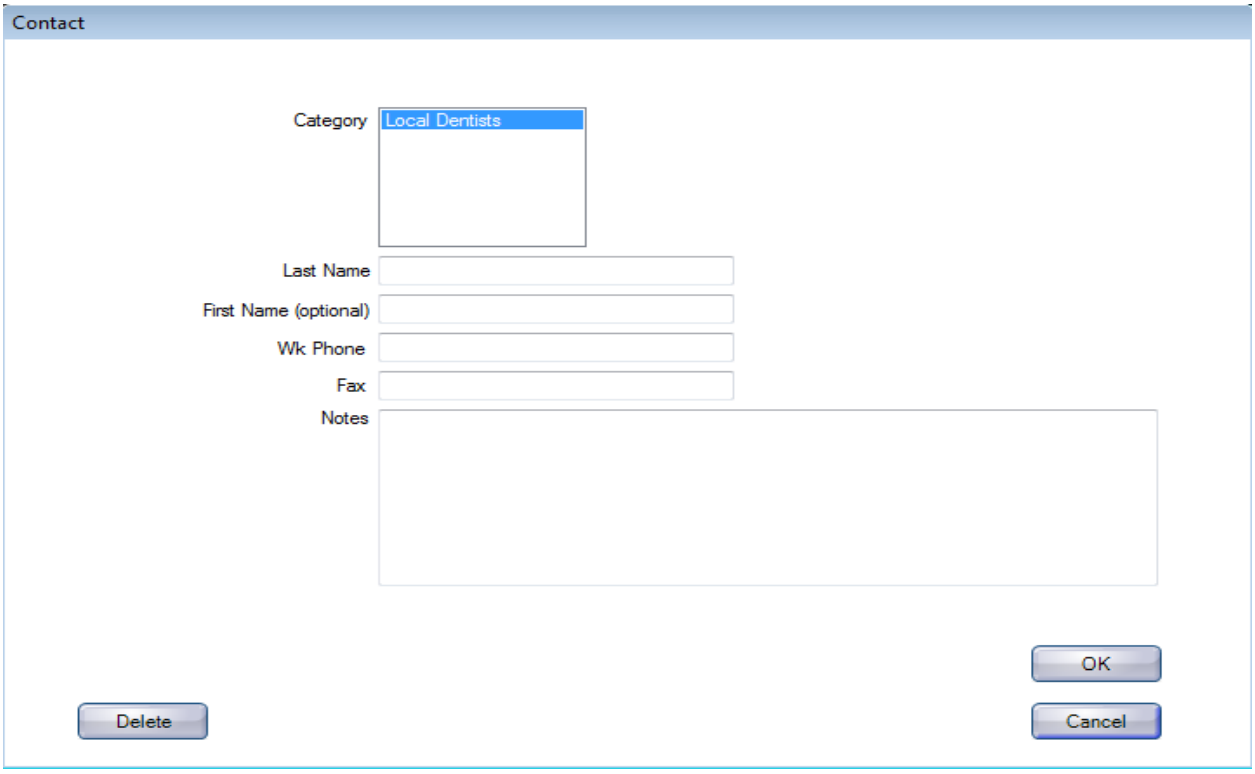
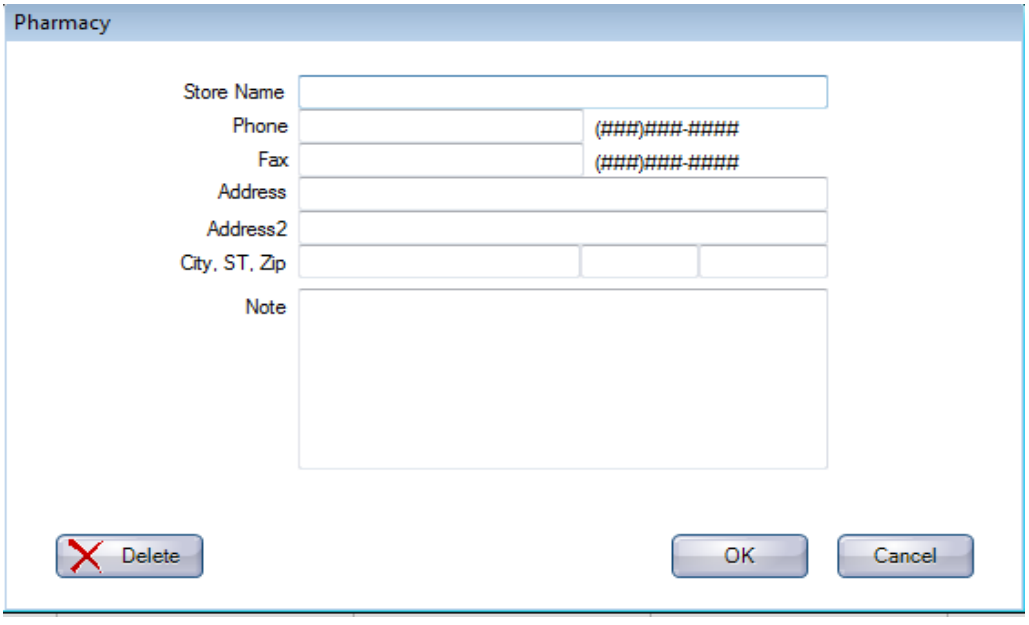


New Contact

3.3 New Pharmacy

Pharmacy is the science and technique of preparing and dispensing drugs. It is a health profession that links health sciences with chemical sciences and aims to ensure the safe and effective use of pharmaceutical drugs.



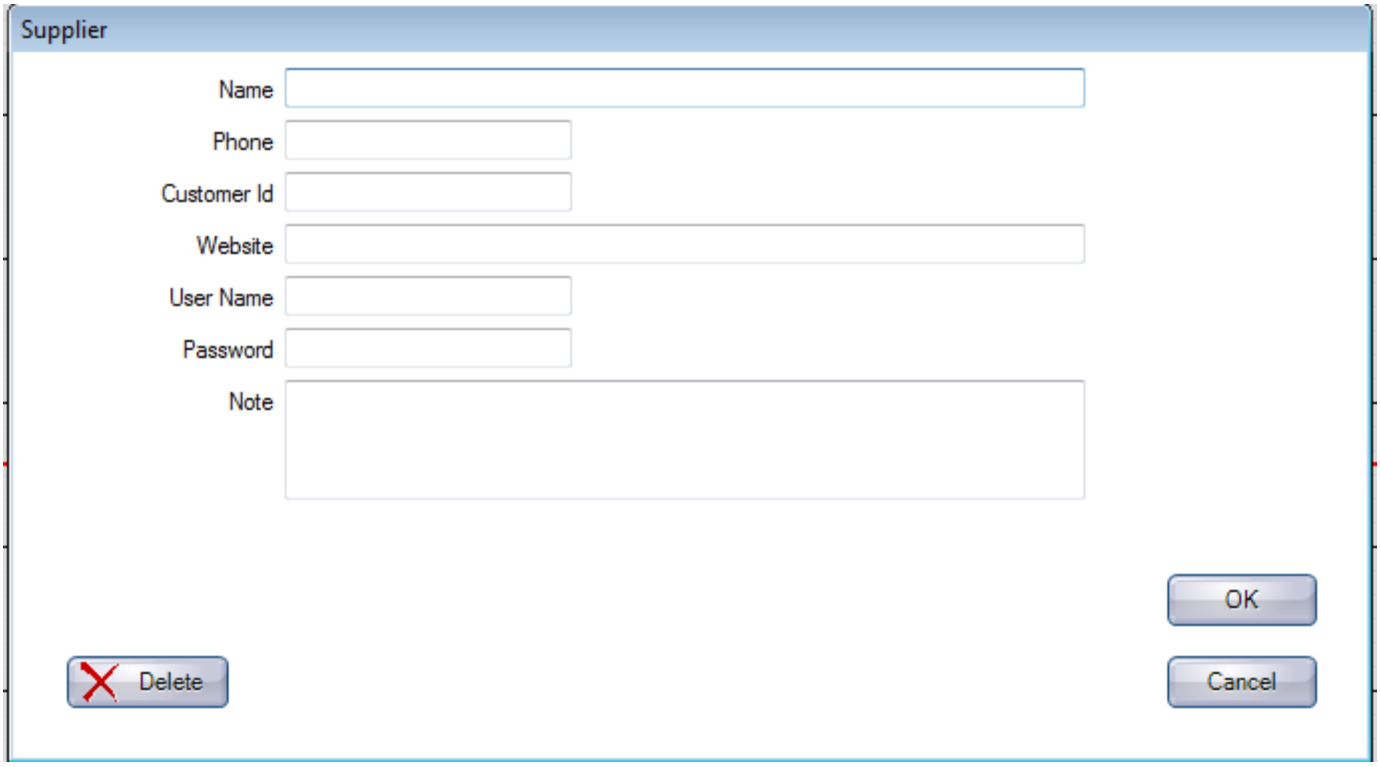
New Pharmacy

This features help in categorizing any number while at the time of an incoming call.

© Copyright HRDSQ, LLC

3.4 New Supplier

A supplier is a person providing ……

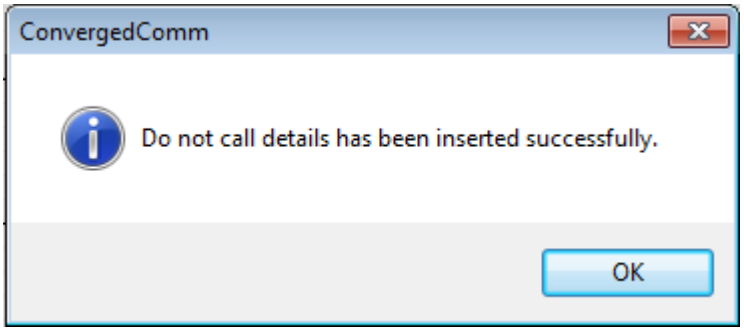


New Supplier

3.5 Do Not Call

A number set to "Do Not Call" will provide the pop-up. But, the number will be unidentified.

The layout will look like below:



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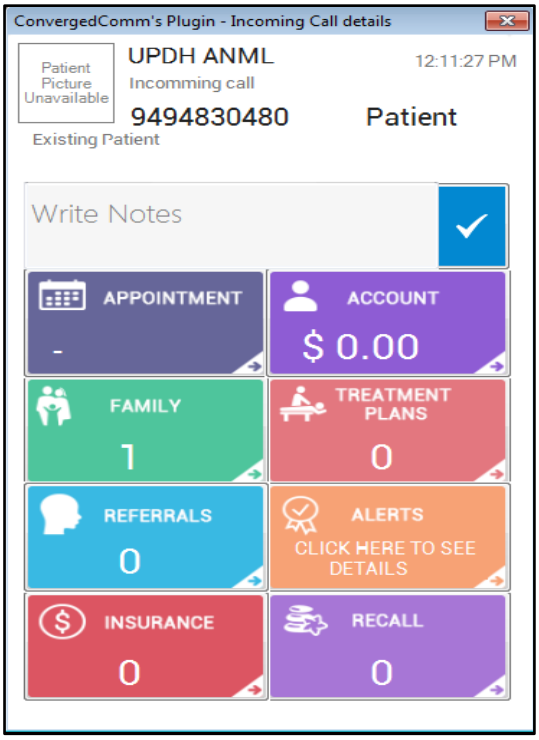
4. Identified Call (popup) Layout

In today's day and age there is an expectation to know everything about everyone trying to contact us. At the same time we have become more suspicious of those who try to contact us without revealing their identity at the same time. Caller identification, a feature that has only been widely available on telephones for the last 15 or 20 years, has become something that most of us needed.

The Identified Call (popup) layout comprises of six main areas (tabs):

- **a.** Appointment
- **b.** Account
- **c.** Family
- **d.** Treatment Plans
- **e.** Referrals
- **f.** Alters
- **g.** Insurance
- **h.** Recall

The layout will look like below:



Incoming Call Details

*Note: The user can also write some notes in the **Write Notes Field** while the call is going on.*

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